Active Partners Performance System (APPS)
Quick Tips

Step 1 - Establishing Your Organization in APPS

☺ *Note: A good rule of thumb is if your company has filed a financial statement, then your company should be registered and all that is needed is a Coordinator or User ID.*

- If your company has never done business directly with HUD you need to register by going to the following URL- https://hudapps.hud.gov/apps/part_reg/apps040.cfm
- After completing this screen, the system takes 24 hours to access the data. Wait at least 24 hours after creating the Participant before applying for your Coordinator or User ID.

Step 2 - Registering for a Coordinator/User ID for a Company or Individual

☺ *Note: If you do not have a Participant Record in APPS, you must establish your identity within APPS before registering for a Coordinator or User ID. Please refer to Step 1*

Types of Users in Secure Systems:
- **Coordinator:** Controls access to the system and performs system administration functions, such as retrieving IDs, and assigning rights to users. For more information please refer to Chapter 3 of the Online User Guide.

☺ *Note: The system limits each Business Partner to two Coordinators. It is recommended that the Business Partner Executive Director designate two Coordinators to ensure backup of daily system administration needs.*

- **User:** A User can be an employee of the Business Partner or a third party (e.g., CPA) authorized by the Business Partner's Coordinator to submit data for the Business Partner.

☺ *Note: Please use your parent company Tax ID when registering for Coordinatorship*

☺ *Note: Initial Coordinator Registration will only register one company/individual.*

☺ *Note: To request Coordinatorship for multiple companies/individuals, you must have first completed Steps 2 through 5 for your first Coordinatorship. You may then go directly to Step 6 to request additional Coordinatorships.*

- Register for Coordinator/User ID at https://entp.hud.gov/idapp/html/part_reg.htm
- Receiving Your Coordinator/User ID:
    - Allow two week to process the Coordinator ID request.
    - User registration applications are processed nightly. (Can only be retrieved by Coordinator)

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Step 3 - Assigning yourself as a Coordinator

Once you have registered and have received your Coordinator ID, you will need to assign yourself as a Coordinator for the company/individual

- On the APPS Web Page http://www.hud.gov/offices/hsg/mfh/apps/appsmfhm.cfm
- Click Secure Systems
- Enter User name (which is your M ID) and Password (The password you selected during registration.)
- Click "OK"
- On the User Login Legal prompt screen, Click "Continue"
- Select "User Maintenance"
- Enter your Coordinator ID (M ID)
- Click on "Search for User"
- Select "Maintain User Profile – Actions" from the "Choose a Function" drop down menu
- Click "Submit"
- Check "COR – Coordinator" checkbox and "UPD- Update" checkbox
- Click "Assign/Unassign Actions"
- Select "OK". You have now assigned yourself as a Coordinator

Step 4 - Assigning yourself role and User roles

- On the "Secure Systems Main Menu", select "User Maintenance"
- Enter your "Coordinator ID" or "User ID" (M ID)
- Select "Maintain User Roles" from the " Choose a Function" drop down menu
- Click "Submit"
- Check "AUP– APPS Update" checkbox
- Click "Assign/Unassigned Action"
- Select "OK". You have now assigned yourself roles

☺ *Note: Please reboot your system at this point for your new assignments and roles to be activated.*

Step 5 - Assigning yourself rights to Company/Companies/Individuals

- From the Secure Systems Main Menu page, select "Participant Assignment Maintenance"
- Enter your User ID (M ID)
- Select "Assign Participant" from the "Choose a Function" drop down menu
- Select "AUP - APPS Update" from the Choose a Role section
- Select the company/companies/individuals you want to assign rights to from the Participant section (You can select multiple participants by using the Control key on your keyboard)
- Click "Submit"
- Verify the list of company/companies/individuals you are requesting relationships for
- Click "Confirm"
- Click "OK"

Step 6 - Registering Coordinatorship for multiple Companies/Individuals

☺ *Note: You must complete Steps 2 through 5 before you can request Coordinatorship for multiple companies/individuals.*

- From The "Secure Systems Main Menu", select "Business Partners Maintenance"
- Enter your User ID
- Select "Request New/Delete Existing Relationships" from the "Please enter a Function" drop down menu
- Enter the Taxpayer Identification Number (TIN)/Social Security Number (SSN) for the companies/individuals you would like to assign rights to
- Click "Submit"
- Verify names and addresses (To ensure activation keys are mailed to the proper address)
- Click "Confirm"
- Click "OK"

☺ *Note: You will need to wait at least two weeks to receive your activation keys from HUD.*

- To activate your relationships:
    - From the Secure Systems Main Menu page, select "Business Partners Maintenance"
    - Select "Activate Relationships" from the "Please enter a Function" drop down menu.
    - Enter Activation Keys
    - Click "Submit"
    - Verify information
    - Click "Confirm"
    - Click "OK"

Step 7- Assigning yourself rights to Company/Companies/Individuals
- Repeat Step 5

Step 8 - Assigning the User System Roles by the Coordinator
- For the Coordinator to retrieve the User ID:
    - From the Secure Systems Main Menu page, select "User Maintenance"
    - Enter "First Name" and "Last Name" of the User
    - Select "Search Users"
    - Retrieve User ID
- To assign the User System Roles:
    - From the Secure Systems Main Menu, select "Participant Assignment Maintenance"
    - Enter the retrieved User ID (M ID), select Assign Participant from the "Choose a Function" drop down menu
    - Select "AUP/APPS Update"
    - Select the company/individual you want to assign user roles to (You can select multiple companies/individuals by using the Control key on your keyboard)
    - Click "Submit"
    - Verify information
    - Click "Confirm"

- Click "OK"
- The User will now be able to submit data for the company/individual.

Step 9 – Getting started in APPS ☺

- From the Secure System, select "Active Partners Performance System (APPS)"
- Select "Create Baseline" from the "Submission Processing" drop down menu.
- Click "Go"
- Enter "TIN"

☺ *Note: The baseline submission is a wizard process that takes you through each step in establishing a baseline. Please refer to Chapter 6 of the Online User Guide for detailed instructions on baseline submissions.*

The steps in the wizard process are:

Step 1 - Enter Contact information

- Select "Create Baseline" from the *Submission Processing* drop-down list. Click Go.
- Enter the applicant's TIN. Click Submit.
- Enter the Contact Information. (Note that the Fields marked with an asterisk are mandatory.) Click on Next Step.

Step 2 - Create Organizational Structure

☺ *Note: You must add at least one individual principal to the Organization Structure in order to submit a Baseline.*

☺ *Note: Organizations added as principals must have previously submitted a Baseline Submission in APPS.*

- To add Principals from the Step 2 Organization Structure screen select the Add Principal button.
- Enter the principals TIN or SSN. Select Search.
- Enter the principal's information. (Fields marked with an asterisk are required).
- Click Save. The screen refreshes with the message, "Principal has been added successfully."
- To add another principal repeat this process. Select Next Step.
- To edit principals, select Edit Principal, edit and save.
- To remove principals, select Remove Principal, remove and save.

Step 3 - Add Previous Participation

☺ *You can only add/edit Previous Participation while entering a submission and prior to sending the submission to HUD.*

☺ *Previous Participation is accessible from the APPS Home Page in the Participant Processing drop-down list, the 2530 Submission screen, the Organization Structure screen, and the Submission List screen from the Select participant processing drop-down list.*

- To add Previous Participation from the 2530 Submission, Step 3 Edit Previous Participation screen select Previous Participation, Click Add Participation.
- Select a Property Role (note the fields marked with an asterisk are mandatory.) Fill information and click Search.
- Select the property for which you want to establish Previous Participation. Click Previous Participation.
- To edit select edit link on the upper right hand corner of that respective section.
- When done click on Finish. The Previous Participation Detail screen displays your new information.
- Click Save. The Screen refreshes with the message, "Save was successful."
- Click Previous Participation List button to go back to the Previous Participation List screen.
- To edit Previous Participation select "Edit Previous Participation" from the Select Participant Processing drop-down list. OR From the 2530 Submission screen, select "Previous Participation" from the *Select participant processing* drop-down list.
- Select the Previous Participation to be edited. Click Edit Participation.
- Edit the appropriate fields. Click Save. Screen displays with the message, "Save was successful."
- Click Previous Participation List button. The Previous Participation List screen displays with your new information.
- To return to the 2530 Submission page click on 2530 Submission Edit Previous Participation

Step 4 - Add Comments
- From the 2530 Submission Step 4, Edit Applicant Comments screen add comments and Click on Finish. The screen will refresh with a message Baseline Submission completed.

Once you have established all Principals and Previous Participation, you have now completed the Baseline Submission Process. You will now be redirected back to the APPS Home page.